HOW TO ARTICULATE

Requesting and Assessing Credit in the BC Transfer System

Finola Finlay
Associate Director, BCCAT

BRITISH COLUMBIA COUNCIL ON ADMISSIONS & TRANSFER

How to Articulate:

Requesting & Assessing Credit in the BC Transfer System

Prepared by *Finola Finlay* – Associate Director (Writer) *& Valerie Yorkston* – Executive Assistant to the Council (Project Coordinator), with assistance from BCCAT staff and in consultation with individuals from throughout the BC Transfer System

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709 – 555 Seymour Street, Vancouver, BC V6B 3H6 Canada
Phone (604) 412-7700 | Fax: (604) 683-0576 | Email: admin@bccat.bc.ca

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The Purpose of this Handbook

The purpose of this handbook is to provide a resource for institutions, departments, faculty members, and articulation committees who are engaged in articulating courses and programs for credit within the BC Transfer System.

The handbook is based on best practices as observed and recorded by the British Columbia Council on Admissions and Transfer (BCCAT) over many years of coordinating and administering articulation and transfer. Founded on long-established principles, the handbook is intended to be a practical and user-friendly manual that codifies what faculty and administrators have learned from experience and what works best in the BC context. As such it includes suggestions, checklists, models, and questions and answers about common and not-so-common articulation issues. It not only covers the basics of bilateral course-to-course transfer, but also provides essential information for those engaged in multilateral or block transfer, or in alternate or innovative approaches to articulation.

What this Handbook is Not

This handbook is not intended to be a guide to institutional transfer policy, nor does it deal with all aspects of the recognition and crediting of learning, such as Prior Learning Assessment and Recognition (PLAR), challenge credit, credit awarded for non-articulated courses or programs, advanced

standing etc. While the principles, best practices, and processes suggested in this handbook may be applicable to most credit transfer decisions, this handbook addresses traditional transfer that is the end result of the formal articulation of courses and programs between and among institutions that participate in the BC Transfer System.

Online Version

This handbook and many other resources related to transfer and articulation can also be found at, and downloaded from, the BCCAT website bccat.bc.ca. To comment on the handbook, or request a copy, please email articulation@bccat.bc.ca or call 604-412-7700. To ask a specific question about an articulation issue or to request assistance with articulation processes, email transferguide@bccat.ca.

Examples of articulation agreements throughout this handbook are from the *BC Transfer Guide*. Some may no longer be current; and are provided simply as illustrations of types of agreements.

What is Articulation?

Articulation is the "action or manner of jointing or interrelating,"[1] and it is what allows multiple sectors or branches of education, each with its own distinctive characteristics, to function as a system. Through the process of articulation, institutions assess learning acquired elsewhere, in order that credit towards their own credentials may be provided.

Articulation is a process involving a series of transactions that:

- relies on faculty decisions;
- acknowledges the different character and missions of institutions and the integrity of programs;
- is built on trust and on many years of interaction in articulation committees; and,
- results in the awarding of transfer credit.

Articulation is a process. Transfer credit is the end result.

The ultimate beneficiaries of the articulation process are the students, who can be assured that their learning will be appropriately recognized. Thus, all articulation supports the fundamental principle of equity on which the articulation environment is built: *that students should not have to repeat content of which they have already demonstrated mastery, nor be denied credit because of technicalities. Nor should they be credited with learning they have not acquired, especially if that learning is fundamental to their advancement to further study, or a required element of their program.*

Forms of Articulation

In BC the most common form of articulation used to establish transfer credit for academic courses is bilateral course-to-course articulation.

Bilateral course-to-course articulation starts when one institution (the sending institution) sends a course to another (the receiving institution) with a request that the course be awarded transfer credit. If the course is judged by a faculty member at the receiving institution as *equivalent* to one of the institution's own courses, that (receiving) institution has indicated that it will accept it *in lieu of* one of its own courses. Once this happens, the course has been formally articulated, and the student who presents this course on a transcript at the receiving institution will receive the transfer credit recorded in the *BC Transfer Guide*.

Within a bilateral course-to-course articulation process, each course at each sending institution is articulated individually with each receiving institution. Therefore, each sending institution course has multiple bilateral articulation agreements. This form of articulation, being the most common and also the most complex, is the subject of the two largest sections in this handbook: *At the Sending Institution* and *At the Receiving Institution*.

A different approach to articulation, multilateral articulation, is practised by several disciplines within the BC Transfer System, most notably by Adult Basic Education (ABE) programs, English as a Second Language (ESL) programs and Business Management diploma programs. These programs articulate their courses collaboratively, comparing each course to a set of outcomes or content statements that have been jointly developed as representing an acceptable standard for the course. This approach is described in the section *Multilateral Articulation*.

Yet a third form of articulation occurs where institutions compare whole programs and assess how students can, for example, move from a diploma to a degree. This is commonly known as *Block Transfer* and is described in detail in that section of the handbook.

Transfer innovation projects are often undertaken by articulation committees to improve transfer in their discipline.

Other innovative approaches to articulation are often undertaken by articulation committees and some of these forms of articulation are described in the section titled *Transfer Innovations*.

Articulation in BC: A Success Story

The British Columbia post-secondary system has a well-integrated model of differentiated institutions committed to recognizing and awarding credit for equivalent learning through the process of articulating courses and programs for credit. Every year considerable resources are spent on articulation (up to $7 million by one estimate),[2] and it is money well spent. About 8000 individual courses, each with seven agreements on average,

were listed in the *BC Transfer Guide* in the spring of 2005. Alongside these course-to-course agreements are hundreds of block transfer arrangements allowing students to earn credit for completed diploma programs, and numerous other course and program agreements that facilitate transfer.

Do students get the transfer credit they deserve? BCCAT's research indicates that the answer to this question is YES. In a series of studies undertaken by three universities,[3] the key finding is that BC college transfer students receive credit for the vast majority of college credits earned. Credits that do not transfer are primarily from programs not designed for transfer or from pre-university programs such as ABE or ESL.

Numerous BCCAT studies demonstrate that transfer in BC works. Students get the transfer credit they deserve, they perform well after transfer, and they rate their transfer experience highly.

Other BCCAT studies have involved in-depth interviews with students contemplating future transfer and reflecting on past experiences, as well as analyses of former college and institute students' responses to transfer-related survey questions. While transfer students face some challenges and need to plan their programs carefully, the vast majority of transfer students rate their experiences highly, and are glad that they chose a transfer route to a degree.

The institutions, public and private, that participate in the BC Transfer System are listed in the *BC Transfer Guide*.

Articulation polices and practices in British Columbia facilitate credit transfer, ensure equitable treatment of students and promote an efficient and economical post-secondary system.

The Principles of Articulation

When considering how to articulate a course for transfer credit, evaluators are faced with numerous decision points. Fortunately, they can turn to a number of principles to guide them as they try to ensure that courses are articulated fairly and consistently. These can be divided into *Foundational Principles*, *Operating Principles*, and *Provisional Principles*.

Foundational Principles

Foundational principles are those which lie at the core of decisions about *all* articulation of courses and programs.

Equivalence: Equivalent means "equal in value, amount, importance; corresponding; having the same meaning or result."[4] A course submitted for articulation will likely never be identical to the corresponding course at the receiving institution. The assessment of equivalence involves identifying the degree to which it matches in content or outcomes. Discipline and program contexts will dictate the relative importance of the similarity.

Go to "Assessing an Articulation Request: Best Practice" for more details on assessing equivalence.

In Lieu: This refers to the act of awarding transfer credit implies the acceptance of a course in place of a course offered at the receiving institution, or *in place of* an institutional or program requirement. Together with the principle of equivalence, this underscores that the course to be

transferred does not have to be identical to the course for which transfer credit is granted, but that the degree of match or similarity should ensure that students will have the necessary knowledge and background to be successful in more advanced courses.

See the recommendations about using "No Credit" for more discussion of applicability.

Applicability: It is appropriate to award transfer credit for courses that can be used to fulfill the specific or general requirements of a credential or program at the receiving institution.

Fairness: Provisos and restrictions (such as adding a specific grade requirement) should not be placed on equivalent courses unless those same restrictions apply at the institution awarding the transfer credit, or there are clear and defensible reasons for doing so.

Situational Principles

Situational principles provide useful guidance but are not universally applicable. While they form part of the decision-making toolkit for articulation, situations and contexts create provisos for their application.

Reciprocity: If institution A recognizes institution B's course as equivalent to a course at A, then B should in turn recognize A's course as equivalent. However, reciprocity is not possible in all cases. For example, where there are differences in the level at which the course is taught, the prerequisites, the rigour of the curriculum, or the topics covered, the institution offering the less rigorous course may be willing to award transfer credit to the more rigorous course. However, the institution offering the more rigorous course will be understandably reluctant to award credit for the less rigorous course. Therefore, while best practice entails reciprocity, there are many situations where this is not possible.

Triangulation: If course A is equivalent to course C, and course B is equivalent to course C, is A equivalent to B? While in many cases institutions can rely on such an informal approach to equivalence, a detailed examination of outlines for courses A and B can reveal significant differences. Where a large volume of transfers must be established (e.g. by a new receiving institution), and articulation agreements already exist for many of the courses, triangulation can be an efficient method of avoiding unnecessarily lengthy assessments of equivalence.

How a course is delivered is normally immaterial to its articulation.

Pedagogy: Under some circumstances it is appropriate to consider *how* a course is taught. Factors such as cultural sensitivity, or opportunities for practicing skills, may be integral to content mastery. See *Pedagogy* in *Assessing an Articulation Request* for more on this.

Delivery: BCCAT has taken the position that how a course is delivered is normally immaterial to its articulation, since teaching a course in a distance delivery format (as opposed to face-to-face) should not affect its equivalence. However, there may be occasions where the content is intrinsically linked to delivery, and an alternative mode impacts on equivalence. It may also be relevant whether a course is offered only online, or if an online course is a version of a course normally delivered in a traditional classroom.

Operational Principles

Operational Principles refer to practices and attitudes that will facilitate articulation.

BCCAT provides a provincial "transfer-friendly" course outline form for voluntary use, at: bccat.bc.ca/outline.

Comparability: Since it should be possible to compare courses, the elements of the course must be clearly outlined and should be interpretable by faculty in the same or a related field. The best assurance of comparability is a comprehensive course outline that both contains sufficient information to allow for the assessment of equivalence, and conforms broadly or specifically to the norms of course description in BC.

Transparency: Assessment practices should be open to scrutiny. Any individual who ass gns transfer credit based on the assessment of a course should be prepared to explain the reasons for the decision, including any influencing factors.

Efficiency: Business processes that are overly time-consuming or complex lessen the likelihood that articulations will be processed in a timely manner. BCCAT has developed efficient online processes for articulation, and can assist any institution wishing to streamline its internal work flow.

Parity of Esteem: Every institution sends and receives students, and students request transfer credit for the courses they have taken. Faculty should treat courses from other institutions as they would like their own courses to be treated. In this context, John Dennison, Professor Emeritus of Higher Education, UBC, and former Council Co-Chair, refers to a "parity of esteem"[5] among institutions as "the ideal goal in a diverse galaxy of post-secondary institutions." Promoting parity involves communicating diplomatically, offering constructive suggestions, avoiding dictating terms, and providing justification for an award of "no credit."

The "Golden Guideline" of Articulation:
Treat all courses as you would want your own to be treated.

Requesting Articulation: Best Practice

Developing a New Course

Every course fulfills multiple objectives for students, instructors, departments, and institutions and all those objectives must be taken into account as the course is being developed. Sometimes other objectives are more important than that of transferability. For example, if a college has determined that students have difficulty with certain content, it may develop a course designed to fill in students' backgrounds and bring them up to the standard of knowledge required for subsequent success in the discipline. Even though the course may be denied transfer credit because it is viewed as preparatory, this is sound pedagogical practice. In addition, faculty expertise in a department may be regarded as a good reason to offer a course that may not receive transfer credit, or the course may be so unique that it is difficult to articulate.

At the same time, if a course is designed to transfer, it must be consistent with the norms, content and standards of the receiving institutions with which articulation is sought. It does not have to be identical to a course at a receiving institution – in fact, if it is to articulate widely it must often integrate aspects of similar courses at several institutions.

If a course is designed to transfer, it must be consistent with the norms, content and standards of the receiving institution.

At the Sending Institution: 7 Steps to Requesting Articulation

Step	Who	To Do	Resource
1	Faculty member/ course developer	Develops a new course outline, or re-develops an existing course	See *The Course Outline*, and *Rearticulating a Course*
2	Faculty member/ course developer	Consults with colleagues in other institutions as appropriate, using articulation committee contacts. Purpose of consultation is to refine outline to guarantee transfer credit.	More about this in *Before Requesting Articulation*
3	Faculty member/ course developer	Finalizes course outline. Gives list of potential equivalencies (desired credit) to ICP.	More about this in *Submitting for Articulation*
4	Faculty member/ course developer	Submits course outline for departmental and institutional internal approval processes	Follow institutional processes
5	Institutional Contact Person (ICP)	Once approved, forwards course outline to all relevant receiving institutions with a request that it be considered for transfer credit. Specifies desired credit.	The outline is attached to the official *BCCAT Online Transfer Credit Request Form*, and must be in electronic format.
6	Faculty member/ course developer	Asks Institutional Contact Person to check change reports and be ready to act immediately if course is given "no" or inappropriate credit.	
7	Institutional Contact Person (ICP)	Informs instructors, department, advisors, etc. once the course has been articulated. If course does not receive desired credit, consults with faculty member/course developer regarding re-submission.	

The Course Outline

A detailed course outline is the starting point of any articulation process, since articulation demands a close examination of course elements in order to establish equivalence. Most institutions in the BC Transfer System use course outline forms well suited to this purpose. BCCAT has also developed a *Transfer-Friendly Course Outline Form*, which can be found online at bccat.bc.ca/outline. This provincial resource has been developed to help reduce the number of situations where transfer is denied because of inadequate content and detail in the outline.

Before Requesting Articulation

Peruse the calendars of the receiving institutions and identify similar courses. In the absence of similar courses, it may be possible to find some that may be equivalent in overall intent, approach, or broad subject matter such as a second year regional history course as an analogy to a second year course on the history of China.

Request copies of relevant course outlines from the major receiving institutions. Establish who in the department is the best faculty member with whom to communicate, and inquire if there are any relevant departmental or institutional policies. For example, are final exams required? Are there requirements regarding the percentage of the final grade that must be based on exam marks? Are there class size limits? Are labs required or optional?

Check the BC Transfer Guide. By doing a "Search by Receiving Institution" for similar courses it is possible to establish which other sending institutions have equivalent courses already receiving transfer credit. Those course outlines may be instructive, since they already receive the desired credit. Checking the transfer credit awarded at other institutions for these sending institution courses will reveal which ones achieved transfer at a number of receiving institutions.

Consult articulation committee colleagues. Once a draft course outline is ready, an instructor can use the expertise of articulation committee members. Many articulation committees have listservs or group email lists to facilitate requests for advice or feedback. If there is any doubt about transferability the appropriate faculty member at the receiving institution(s) should be requested to provide specific feedback on the draft course outline.

Doing some homework can prevent articulation difficulties.

Reflect on and balance advice received. Asking for advice and feedback on a course can be a sensitive area for faculty. Professional

responsibility and autonomy include the principle of freedom to develop and teach a course according to one's best professional judgment. Requesting advice from a faculty member at the receiving institution acknowledges that the receiving institution may exert some influence over the content or the structure of the course. Occasionally, a faculty member from a receiving institution responds by requesting modifications that may be unacceptable to the sending institution or that may compromise the transferability of the course at other institutions. In these instances, (rare, in BCCAT experience) best practice involves communicating as diplomatically as possible and seeking a mutually acceptable solution.

Decide when "no credit" is acceptable. It is recognized that in some instances an award of "no credit" is appropriate, and is acceptable to the sending institution. For example, it may be important that students understand clearly that a course will not receive transfer credit at certain institutions, since they will then be in a better position to plan their transfer program. If an award of "no credit" is not acceptable, continued communication will be necessary.

Outcomes-based course outlines should also list topics covered.

Should the course outline list the learning outcomes or the topics covered?

Several institutions in BC have embraced a learning outcomes approach for the construction and design of curriculum, and their course outlines have been tailored to reflect this approach. In addition, some articulation committees have spent considerable time defining and describing the outcomes appropriate to their disciplines.

A course outline that emphasizes learning outcomes is well suited to the task of articulation provided there is sufficient detail to ensure that an equivalence assessment can be made by a faculty member who may not be familiar with this approach. Because an outcomes approach to describing curriculum has not been universally adopted in BC, BCCAT advises that outcomes-based course outlines should also include a description of the curricular content of the course. Faculty members at institutions that do not design their courses from an outcomes perspective have indicated that they need this information to determine the best transfer equivalence.

Submitting for Articulation

Once the course outline is finalized it must be approved by the academic governance of the sending institution, such as an Education Council or Senate. An electronic copy of the course is then sent to all appropriate

receiving institutions with a request for transfer credit. At each institution this process is handled by the Institutional Contact Person (ICP) or delegated by the ICP to the Transfer Credit Contact (TCC), who uses BCCAT's Transfer Credit Evaluation System to forward the request and the course outline.

Since, in the preparation for articulation, the faculty member will have discussed potential equivalencies with the receiving institutions, *it is very helpful to specify the credit desired for the course, including the course at each receiving institution for which equivalence is sought, so that this can be included on the accompanying form.* Where this is not possible, every effort should be made to provide details about the desired credit, especially the discipline or department to which the request should be routed. Transfer Credit Contacts at receiving institutions have told BCCAT that this is vital information that assists them to direct the course to the most appropriate department or faculty member.

"When we don't know where to direct courses they tend to sit on a desk somewhere. This really delays articulation and is frustrating for us and the sender."

– University Administrator

It is also good practice to specify the year level credit desired where there is any possible ambiguity. Some sending institutions, for example, use 300 and 400 level course numbers for courses taught at the second year level, and this can create confusion at a receiving institution that uses these numbers exclusively for third and fourth year courses. Where it is likely that unassigned credit will be awarded at the receiving institution, specifying a year level can help the assessor to clarify the appropriate credit.

The Two-Course Sequence

If the course is a semestered course equivalent to half of a year long course, and normally taught in a two-course sequence, it is highly recommended that *both* semester courses be submitted for credit at the same time. This allows the receiving institution to award unassigned credit for one semester, and assigned credit for two semesters, in the same designation, as is the case with Northern Lights College's HIST 103 below. A typical *BC Transfer Guide* entry for such a two-course sequence looks like this:

Sending Institution Course	Receiving Institution	Transfer Credit	Effective Dates (mm/dd/yy)
NLC HIST 103 (3)	UBC	UBC HIST 1st (3); NLC HIST 103 & NLC HIST 104 = UBC HIST 135 (6)	9/1/95 to -

In many two-semester courses, topics are covered in different sequences in different institutions. Providing both course outlines allows for a comprehensive assessment of both courses at the same time.

Timeline for Articulation

Articulating a new course can be slow process, and it is essential to begin the process well in advance. Below is a sample suggested timeline

When	To Do
May/June, Year 1	• Develop course outline • Review calendars and entries in the *BC Transfer Guide*; • Consult colleagues at receiving institutions, etc. • Refine outline • Develop reading lists
Fall Semester, Year 1	• Follow procedures for internal approval for course – departmental, institutional, etc. • Order library, lab and other support materials • Submit to receiving institution for articulation • Add course to calendar
Spring Semester, Year 2	• Receiving institution agreements come in • Renegotiate where needed • Note new entries in the *BC Transfer Guide*
May/June, Year 2	• Plan first offering for fall, • Develop syllabus (or detailed course outline suitable for classroom)
Fall Semester, Year 2	Course delivery!

Re-articulation is a much faster process, but can still be time consuming if the receiving institution does not respond quickly. It is recommended that institutions allocate as much time as possible and at least one semester.

Most articulations proceed smoothly – it is not unusual to receive a response to an articulation request within a week. However, delays are also common and it can be detrimental to the interests of a program and its students for courses to begin before transfer credit is assured.

Re-articulating a Course

BCCAT recommends that, once a course has been articulated and transfer credit established, it should be re-articulated *only* if it changes substantively. However, since some non-substantive changes will also affect the way a course is recorded in the database, it is important to *notify* all institutions of certain changes, even where those changes do not require that the course be re-articulated.

Changes Requiring Re-articulation

Re-articulation involves sending the course outline to all relevant institutions with a request that it be assessed for transfer equivalence. The BCCAT Transfer Credit Evaluation System is used for this purpose. Re-articulation should only be requested under the following circumstances.

- *Substantive change to content or subject matter, or to objectives or outcomes.* Course articulation is based on the principle of the equivalence of academic achievement and of knowledge and skills. Substantive changes, therefore, are changes to the content, subject matter, topics covered, or objectives/outcomes that will alter the equivalence of the course to those courses with which it has been articulated, and that may affect the transfer credit which the course is awarded at other institutions. This is not intended to include relatively minor changes in topics, changes in texts, materials or assignments, reasonable modifications to learning outcomes, or changes intended to update the course or keep it in line with the evolving norms of the discipline.
- *Substantive changes to assessment criteria or evaluation methods, only if certain assessment methods or weighting are* **integral** *to the articulation of a course.* For example, some institutions require all courses, or certain courses, to have a final exam, and some require that a percentage of the final grade be based on a final exam.
- *Changes to the number of credits assigned to the course, or to the number of contact hours.* Normally, a change to credit hours signals that content has been added or subtracted. Such changes affect equivalence and in turn the transfer credit assigned to the courses, including the number of credits awarded. Therefore re-articulation is appropriate.

BCCAT recommends that institutions do NOT routinely re-articulate courses when they undergo minor revision or updating. This just creates a lot of work for no change.

Changes Requiring Notification but Not Re-Articulation

Notification should be done using the online Transfer Credit Evaluation System. This will ensure that the record of transfer credit will be updated in the *BC Transfer Guide* and will alert receiving institution contact persons to update their internal tables as appropriate. Since most transcripts are now

read electronically, failure to notify other institutions of the changes below can endanger transfer credit for students.

- Changes in the discipline code or course number. For example: from ENG 101 to ENGL 101; MATH 100 to MATH 199.
- Changes in course title or course name.

"I took an English course at the college and was assured it transferred. Later, I found that it transferred all right, but not as an English course. So I had to do a whole extra semester. I wish someone had told me."
–Transfer Student

In the Classroom

Many student complaints about transfer credit occur because of a false expectation that a course will transfer, or will transfer as assigned credit rather than unassigned credit, or will satisfy a program requirement.

Where possible, BCCAT encourages instructors to:

- include information regarding course transferability in course syllabi;
- encourage students to check the *BC Transfer Guide*;
- encourage students to inform themselves how the credit can be applied to their choice of program at the receiving institution; and,

Course Codes

Some institutions adopt a practice of indicating courses delivered in non-standard ways with special notations added to the course code. For example, an online French course might be entered on the transcript as FREN 200E.

BCCAT does not recommend such practices for two reasons:

- Course articulation is based on an assessment of equivalence of content or outcomes, and the method of course delivery is normally assumed to be immaterial; and,
- Such designations on a transcript can result in loss of credit to the student. Transcripts are normally read electronically at large institutions. A mapping file that is set to read and understand FREN 200, will reject FREN 200E as a non-articulated course.

"Minor variations in course codes can mean the difference between easy transfer and no transfer at all."
– University Admissions Director

There is an exception to this general rule. BC institutions have agreed that credit earned through Prior Learning Assessment may be indicated on the transcript through the use of transcript notations.

The Essential Role of Articulation Committees

The Terms of Reference for articulation committees state that their purpose is to "expand educational opportunities for students by facilitating transfer of students from one educational institution to another." Discipline specialists normally come together once a year to share information, and engage in discussions related to curricular matters, particularly those affecting student mobility. While some committees schedule time for course-to-course articulation at their meetings, transfer credit is not usually negotiated in detail at most meetings. Rather, deliberations at the meetings lead to common understandings regarding course objectives and outcomes, and relevant teaching methodologies.

Articulation committees help the BC Transfer System to function effectively.

Articulation committees promote and facilitate course and program articulation through their meeting agenda and through good communication networks. There are numerous ways in which articulation committees function to make the BC Transfer System run smoothly.

- Professional working relationships are fostered. For any faculty member designing a new course, their articulation committee colleagues are a valuable resource prior to submitting the course for transfer credit, and throughout the articulation process.
- Articulation committees can prevent articulation surprises by scheduling ample opportunity at their meetings for discussion of upcoming curricular changes.
- Current and potential transfer problems can be discussed, as well as ways to prevent problems or deal with those that arise.
- Many articulation committees have undertaken transfer innovation projects with support from BCCAT. Transfer innovation projects are designed to improve transfer pathways for students, or to provide better information about transfer in a given discipline. For more information, see the section on *Transfer Innovations*.
- Articulation meetings can also be used to foster communication with colleagues outside the BC Transfer System whose organizations can impact on course and program transfer. For example, the K-12 school system, professional organizations, accrediting agencies or private institutions can all influence articulation relationships.

The BCCAT publication, *Articulation Committees: Their Essential Role in a Successful Transfer System*, is available from the BCCAT office, or can be downloaded from bccat.bc.ca/articulation/essential.pdf. For more information, contact articulation@bccat.bc.ca.

Instructor Qualifications for Transferable Courses

The following represents BCCAT's position on instructor qualifications within the BC Transfer System:

1. BC Transfer System Instructor Qualification Standards

a) Based on long-standing precedents in the BC Transfer System, BCCAT expects that instructors who teach academic, degree-level transfer courses will usually possess, at a minimum, a master's degree or equivalent in the discipline or in a closely related area.

b) Instructors teaching in other transferable programs (e.g. diploma programs) will usually possess, at a minimum, credentials consistent with the normative requirements for that program in the BC Transfer System.

c) It is recognized that there may be programs in which other qualifications are equally, or more, appropriate. (Examples of alternately qualified instructors: First Nations elders, practising artists, acknowledged or renowned experts or practitioners.)

d) When, for legitimate reasons, it is not possible to engage faculty who meet the standards described above, institutions should provide appropriate mentoring and supervision.

2. Establishing and Monitoring Expectations

a) BCCAT expects institutions participating in the BC Transfer System to develop and/or make explicit and accessible their policies on instructor qualifications for:

i. hiring of instructors in programs for which transfer credit may be negotiated; and,

ii. awarding transfer credit for courses taught at other institutions.

b) It is reasonable for any receiving institution upon occasion to seek assurance as to the hiring policies or practices at a sending institution, or to request specific information about the qualifications of an instructor for an articulated course.

c) In the event that a concern arises that can not be resolved between the institutions, BCCAT can provide mediation services, if requested.

Assessing an Articulation Request: Best Practice

This section of the handbook is intended to guide an evaluator through the process of deciding whether and how to assign transfer credit. For the most part, this is a straightforward process, especially where courses are comparable and the course outline allows for easy assessment of equivalence. Where this is not the case, or where the assignment of credit is not obvious, there is helpful precedence and practice in the *BC Transfer Guide*, from which numerous examples are used.

While practice varies from institution to institution, normally a faculty member receives a course outline attached to a *Transfer Credit Evaluation Form*, with a request to assess the course and assign appropriate transfer credit. Once the course is assessed, the form is completed and returned to the Transfer Credit Contact (TCC) in the registrar's office, who ensures that articulation decisions are properly recorded.

Not all institutions use the entire range of credit options listed here. Evaluators need to know their institution's credit policies.

At the Receiving Institution: 7 Steps to Assessing an Articulation Request

Step	Who (at the receiving institution)	To Do	Resource
1	Institutional Contact Person (ICP)	Receives request through BCCAT's online Transfer Credit Evaluation System. Sends course to appropriate department for evaluation.	
2	Designated faculty member	Reviews course outline and assigns appropriate transfer credit.	More about this process and credit options in *Assessing Equivalence*
3	Designated faculty member	Provides explanation of any transfer credit award that is less than the desired credit. As feasible, communicates diplomatically with sending institution.	Remember the Golden Guideline in *Operational Principles*
4	Designated faculty member	Returns completed form to Institutional Contact Person.	
5	Institutional Contact Person (ICP)	Completes *Transfer Credit Evaluation Form* and submits.	Automatic alert to ICP at sending institution and to Transfer Guide Coordinator for inclusion in the *BC Transfer Guide*.
6	Transfer Guide Coordinator (at BCCAT)	Updates course-to-course database in *BC Transfer Guide*. Periodically, sends summary of all changes to the online guide to institutions to verify that the data entry in the *BC Transfer Guide* is correct.	
7	Institutional Contact Person (ICP)	Monitors change reports.	

Assessing Equivalence

Since the norms of academic autonomy include the right and responsibility of faculty members to design and teach a course as they see best, faculty teaching the same course in the same institution may not choose to teach in the same way. They may choose different texts, readings, assignments, exercises and topics. In each discipline, however, the traditions, norms and body of knowledge of that discipline exercise a broad influence over what is appropriate to cover in introductory, intermediate and advanced levels. Additionally, each institution's internal governance scrutinizes and approves every new course and program, and assesses its suitability for inclusion in the calendar.

In the same way, a post-secondary course with the same name or title will not be identical from one institution to another, and the degree of similarity may vary according to the discipline. The assessment of courses must rely on the judgment of professional faculty as to the equivalence of content. There are several approaches to assessing equivalence.

Content: *There is no universal rule regarding the percentage of match since it is recognized that appropriate match can vary from discipline to discipline.* In some disciplines, where mastery of certain knowledge is prerequisite to success in subsequent courses, it may be vital to have a substantial match of content in courses. Some institutions or disciplines have developed a rule of thumb for the percentage of match while others make case-by-case judgments.

Best practice is to avoid inflexible rules about percentage of match.

Outcomes: Courses can have similar goals, objectives, aims, and outcomes, even if the content varies. For example, two writing courses may use different texts, instructional styles, methods of delivery, and evaluation and grading practices, and yet have the same goal of teaching students to write at a post-secondary level.

Level: A course which has no equivalent in the calendar of an institution may still be suitable to satisfy some of the elective requirements of a credential. For example, some institutions may not offer linguistics, criminology, religious studies, archaeology, languages, or a variety of applied areas. However, if a course is taught at the appropriate level and the standard expected of students is equivalent to that of the credential to which the credit can be applied, it can be deemed equivalent for the purposes of awarding unassigned or elective transfer credit.

Assigned Credit

Award assigned credit wherever possible, as it is the most advantageous credit for students.

Evaluating a course for assigned transfer credit involves assessing its equivalence to a specific course at the receiving institution.

If a course is determined to be equivalent, the transfer credit request form is filled in with the name, code and number of credits of the matching course, and the effective start date. The entry in the *BC Transfer Guide* will look like this:

Course	Receiving Institution	Transfer Credit	Effective Dates (mm/dd/yy)
CAP HIST 109 (3)	SFU	SFU HIST 213 (3)	9/1/95 to -

Most credentials require that students complete certain courses at each level. Awarding *assigned* credit allows students to demonstrate that they have fulfilled requirements. *Therefore, it is sound practice to award assigned credit, wherever possible.*

Unassigned Credit

Unassigned (Elective) Credit in a Discipline or Department

If the course is appropriate for credit in the discipline, but no close match can be established with a department's courses, then "unassigned" discipline-specific transfer credit can be awarded. This type of credit verifies that the course is taught at the expected level and standard, that it conforms to the norms of the discipline, and that it is suitable as elective credit within a degree program. Entries in the *BC Transfer Guide* will look like this:

Course	Receiving Institution	Transfer Credit	Effective Dates (mm/dd/yy)
CAP HIST 207 (3)	SFU	SFU HIST (3) 200 div	9/1/95 to -
CAMO HIST 102 (3)	UNBC	UNBC HIST 1XX (3)	9/1/01 to -
NIC HIS 250 (1.5)	UVIC	UVIC HIST 200 lev (1.5)	9/1/95 to -
LANG HIST 2245 (3)	KWAN	KWAN HIST 2nd (3)	1/1/03 to -

Students can usually use unassigned credit to fulfill general program requirements.

Capilano's HIST 207 is assigned second year credit at SFU, Camosun's HIST 102 gets first year history credit at UNBC, North Island College's HIS 250 receives second year credit at UVic, and Langara's HIST 2245 receives first year credit at Kwantlen. In each case, the course receives unassigned

credit at the first or second year level, but each institution expresses the credit differently. These expressions are often based on the conventions of computerized registration systems, so it is important to follow the standards in use at each institution.

Unassigned (Elective) Credit in a Faculty or Program

More general designations, such as "Arts (3)" or "Science (3)" or "Humanities (3)" can be used where the receiving institution does not have a corresponding discipline, but the course is identifiable as appropriate for elective credit within a faculty or program. The example below shows how different receiving institutions have assigned credit to a Canadian Studies course offered by Kwantlen University College. The credit ranges from assigned credit (SFU), unassigned Canadian Studies credit (UCC), unassigned Humanities credit at the first year level (Malaspina), unassigned Arts credit (UBC), and unassigned Social Science credit at first year level (UNBC). Such diversity illustrates that each institution evaluates the course and awards the most appropriate credit. In this case, the main determinant may be whether or not the institution has a Canadian Studies program.

Course	Receiving Institution	Transfer Credit	Effective Dates (mm/dd/yy)
KWAN CNST 1100 (3)	MALA	MALA HUMA (3) 1st yr	9/1/96 to -
KWAN CNST 1100 (3)	SFU	SFU CNS 160 (3)	9/1/96 to -
KWAN CNST 1100 (3)	UBC	UBC ARTS (3)	9/1/96 to -
KWAN CNST 1100 (3)	UCC	UCC CNST (3)	9/1/96 to -
KWAN CNST 1100 (3)	UNBC	UNBC SOSC (3) 1XX	9/1/96 to -

Unassigned (Elective) Credit for Courses not Identifiable with Course Offerings but Appropriate for Academic Credit

If the course has no corresponding discipline, program or faculty but is obviously at the appropriate academic level, the receiving institution can use a designation such as "general elective." In rare cases, an institution may use this more general designation for a course for which they have a corresponding discipline, but which appears to fall outside the norm for how corresponding courses are delivered or organized at the institution. The first example below shows the credit awarded for CAMO ART 228 at SFU. At Camosun College this course is worth 3 credits, but at SFU, which has no similar course, it is assessed as equivalent to 1 credit of general

elective coursework. In the second example, the Capilano course is a Group Dynamics course for Music Therapy students. UNBC offers nothing similar but recognizes it as a university level course, so credit is "unspecified".

Sending Institution Course	Receiving Institution	Transfer Credit	Effective Dates (mm/dd/yy)
CAMO ART 228 (3)	SFU	SFU GE (1)	9/1/97 to -
CAP PSYC 201 (3)	UNBC	UNBC UNSP (3) 2XX	9/1/95 to -

No credit

Use "no credit" rarely.

"No credit" is an articulation, and will appear in the *BC Transfer Guide*. Awarding "no credit" means that a student is denied credit for learning achieved and must replace that credit with additional coursework. This is expensive for the student, the institution and the system. Where an institution does not offer a similar course or program, every effort should be made to award a minimum of elective credit.

There are two situations in which it is acceptable to award "no credit."

- The course is not taught at the post-secondary level. A course which appears to be English composition, but which is really an English as a Second Language course, will be evaluated as being preparatory. Many courses are not designed for transfer (e.g. purely vocational courses such as Welding, or preparatory courses such as those of Adult Basic Education) except to similar programs at other institutions. Occasionally such courses are submitted for articulation in error.
- A "no credit" is appropriate when it is clear that there is no possibility of the student applying credit for the course towards any program at that institution. For example, a specialized course in a technology, a practicum course for a professional program, or a studio or field course in a subject not congruent with the programs at the receiving institution may not be applicable to any credential.

Other Credit Options

Restricted Applicability

Institutions can designate a course as appropriate for credit only in certain faculties (e.g. "only for credit towards a BSW," "not for credit towards a BSc"). This ensures that students can apply credit earned in an appropriate manner, rather than making the assumption that any credit can be applied to any credential. Restricted applicability is often used for specialized, professional or applied programs. Examples:

Course	Receiving Institution	Transfer Credit	Effective Dates (mm/dd/yy)
KWAN PHYS 1207 (3)	UBC	UBC PHYS (3) towards Science requirement for BA or BFA degrees. Precludes credit for UBC PHYS 340. Not for credit in the Faculty of Science.	9/1/96 to -

Semestered Courses, Year-Long Courses and "Cluster Credit"

"Cluster credit" is used in the *BC Transfer Guide* to denote situations where two or more courses must be combined in order to achieve equivalence. Where a subject is taught in a year-long format in one institution and a semester format in another, the question arises how to award transfer credit. Some institutions consider the semestered courses as a two-course combination, and "tie" the credit. That is, where a student has taken both semesters and is deemed to have covered material equivalent to the year-long course, the institution will award assigned credit. In the following example UVic has awarded assigned credit if the student has taken both one-semester courses, but unassigned philosophy credit if only one semester of the two-course combination has been taken.

Course	Receiving Institution	Transfer Credit	Effective Dates (mm/dd/yy)
CNC PHIL 101 (3)	UVIC	UVIC PHIL (1.5) 100 lev; CNC PHIL 101 & CNC PHIL 102 = UVIC PHIL 100 (3)	9/1/95 to -

It is always good practice to award transfer credit for courses completed at the appropriate level.

It is always good practice to award transfer credit for courses completed at the appropriate level. Awarding unassigned discipline credit for single-semester courses, such as UVic has done in the above example, allows students to earn credit even if they have not completed the two-course sequence.

However, if credit is not possible unless both courses are taken, this should also be clearly stated, as in the following example:

Course	Receiving Institution	Transfer Credit	Effective Dates (mm/dd/yy)
COLU BUSN 272 (3)	UBC	COLU BUSN 272 & COLU BUSN 273 = UBC COMM 292 (4). No credit if taken alone. See Transfer Notes.	9/1/98 to -

Another type of cluster credit occurs when several courses at the sending institution cover outcomes similar to a year-long course at the receiving institution. Example:

Course	Receiving Institution	Transfer Credit	Effective Dates (mm/dd/yy)
DOUG PHIL 151 (3)	UBC	Any two of DOUG PHIL 102, DOUG PHIL 103, DOUG PHIL 151, DOUG PHIL 152, DOUG PHIL 250 = UBC PHIL 100 (6)	9/1/02 to -

Yet another type occurs when a course at the sending institution is equivalent to several courses at the receiving institution or is suitable for credit towards two or more different programs:

Course	Receiving Institution	Transfer Credit	Effective Dates (mm/dd/yy)
CAMO PAC 208 (3)	UNBC	UNBC GEOG (3) 2XX or UNBC INTS 203 (3) or UNBC INTS 204 (3)	9/1/96 to -

The situation can also arise where a two-course sequence (or two separate courses) at a sending institution may be equivalent to one course at a receiving institution. In this case, some discretion may be necessary in deciding whether to assign 6 credits or 3 credits.

For example, a sending institution may decide to break content covered in one semester at the receiving institution into two semesters, in order to assist students with deficiencies in their backgrounds (for example, without grade 12 math) to achieve mastery. In such a case, the receiving institution will likely assign the same number of credits that their own students earn for covering the same content in a more intense format. The *BC Transfer Guide* entry may look like this:

Course	Receiving Institution	Transfer Credit	Effective Dates (mm/dd/yy)
CAP BFIN 141 (3)	UNBC	CAP BFIN 141 & CAP BFIN 142 = UNBC COMM 210 (3)	9/1/96 to -
CAP BFIN 142 (3)	UNBC	CAP BFIN 141 & CAP BFIN 142 = UNBC COMM 210 (3)	9/1/96 to -
CAP COMM 293 (3)	UNBC	UNBC COMM 210 (3)	9/1/95 to

UNBC has determined that the content covered in Capilano's BFIN 141 and 142 is the same as that covered in their own one-semester COMM 210. Note that Capilano College has both a two-semester course sequence and a one-semester course that is equivalent to UNBC's COMM 210.

Two courses at one institution may cover the same material as one course at another institution.

There may be instances where a sending institution offers two distinct courses that cover similar content, *but not the same content*, to that covered in one course at the receiving institution. For example, a student who takes both a geology and a physical geography course at one institution may find that some or many of the topics learned in two courses are normally covered in one course in some degree programs. In another case, a student may take a semester of poetry and a semester of drama in first year English, and transfer to an institution with a one-semester course covering both poetry and drama. In these cases, it is likely that the sending institution courses will have covered more material, or the same material in more depth, than the course at the receiving institution, and therefore it is appropriate that this learning be credited. Good practice is to assign three credits for the equivalent course, plus three unassigned credits, as in the following example of a two-semester short fiction course offered at CNC.

Course	Receiving Institution	Transfer Credit	Effective Dates (mm/dd/yy)
CNC ENGL 214 (3)	SFU	SFU ENGL 101 (3); CNC ENGL 213 & CNC ENGL 214 = SFU ENGL 101 (3) & SFU ENGL (3)	9/1/95 to -
CNC ENGL 213 (3)	SFU	SFU ENGL 101 (3); CNC ENGL 213 & CNC ENGL 214 = SFU ENGL 101 (3) & SFU ENGL (3)	9/1/95 to -

Individual Assessment

This designation can be used for language courses, fine and performing arts courses, or other courses where portfolios, auditions or interviews may be required for an accurate assessment. It indicates that credit will likely be granted, but an assessment of the level of mastery the student has attained must be made by the receiving institution in order to determine the most appropriate credit.

Course	Receiving Institution	Transfer Credit	Effective Dates (mm/dd/yy)
CAMO MUS 100S (12)	UCFV	Individual assessment	9/1/95 to 8/31/05
MALA FRCH 141 (3)	UCFV	Individual assessment	9/1/95 to -

Use "individual assessment" only where mastery must be assessed after transfer, such as for language, or fine or performing arts courses.

While "individual assessment" is an appropriate articulation under these circumstances, there are many situations where better practice would be to award unassigned credit. Evaluators may be tempted to use the term in cases where they are unsure of the level of mastery expected. In the case of fine and performing arts, this can be appropriate. However, in most cases it probably is not and will lead to confusion and lack of certainty for students and for sending institutions. [Note that individual assessment is used differently in block transfer agreements. See *Block Transfer* in this handbook.]

Preclusions

Preclusion credit can be awarded where a course is determined to have similar content, but institutional policy prohibits awarding assigned credit. For example, UBC Transfer Notes contain the following:

> **Upper-Level Courses:** *Normally transfer credit will be granted only for the equivalent first- and second-year UBC courses. Where, however, the college course(s) taken is sufficiently similar to a third- or fourth-year UBC course, unassigned credit will be awarded at first- or second-year level with the notation that further credit for the specific UBC course is precluded.*
>
> **Definition: Preclusion of Credit:** *Where a student is granted unassigned credit on transfer, the student will not also receive degree credit if a similar UBC course is taken subsequently. This applies in cases where the student has taken one half of a six-credit UBC course and where the college course is similar to a third- or fourth-year UBC course. In the tables this is normally clarified with the statement: precludes credit for . . . The name of the course refers to the UBC course unless otherwise stated.*

Here are two examples of preclusion credit.

Course	Receiving Institution	Transfer Credit	Effective Dates (mm/dd/yy)
LANG HMPF 2220 (3)	UBC	UBC HKIN (3) 2nd. Precludes credit for UBC HKIN 368. See *Transfer Notes.*	9/1/95 to -
CAP PHIL 208 (3)	UVIC	UVIC PHIL 200 lev (1.5). May not take UVIC PHIL 333 or UVIC ES 314 for credit.	9/1/95 to -

In the first case, a student from Langara who has taken HMPF 2220 will receive 3 second year Human Kinetics credits at UBC, but may not take UBC's HKIN 368 for credit. If HKIN 368 is a required course in the student's program, the UBC department will advise the student how to choose an alternative course to fulfill that requirement. In the second case, Capilano's second year philosophy course is recognised as covering similar topics to courses offered at the third and fourth year level at UVic. Credit is assigned at the second year level, but because of the overlapping content, credit is precluded for the more advanced courses.

Exemptions

Credit is not earned for exempted courses.

Granting an exemption involves the waiving of a prerequisite or required course for students who have comparable learning. Example:

Sending Institution Course	Receiving Institution	Transfer Credit	Effective Dates (mm/dd/yy)
DOUG CRIM 262 (3)	SFU	SFU CRIM (3). Exemption from SFU CRIM 330	9/1/95 to 8/31/04

Note that although the award is 3 credits in Criminology, credit is not earned for the exempted course and students will likely be required to replace the exempted course with an alternate in order to fulfil program requirements. The following are examples of exemption policies from the Institution-Specific Transfer Notes:

> **UBC:** *Unassigned transfer credit for Commerce courses must have a corresponding exemption granted (i.e. COMM (3) 2nd, Exempt COMM 396) in order to be acceptable for credit towards the B.Com. degree.*

> **SFU:** *In certain cases, in addition to receiving transfer credit for a course, a student may be granted a departmental exemption from taking a certain similar course or courses, usually ones which are required for a major or honours in that department. Where an exemption has been authorized, the information appears in the "Notes" column of this Guide. Exemptions appear on SFU transcripts, showing the exempt course number with a zero credit value, e.g. CHEM 115(0).*

When Credit Values Differ

In the following example, UBC has equated a five credit Kwantlen course with a course that receives three credits at UBC. A student who took this course at UBC would receive three credits; therefore, it is fair that a similar course should be awarded the same credits as the UBC course. The operating principle is that a student will not receive more credit for a transfer course than would have been given had the course been taken at the receiving institution.

Course	Receiving Institution	Transfer Credit	Effective Dates (mm/dd/yy)
KWAN BIOL 2321 (5)	UBC	UBC BIOL 200 (3)	9/1/00 to -
KWAN BIOL 2321 (5)	MALA	MALA BIOL 200 (3)	9/1/00 to -

Another practice frequently folllowed by receiving institutions is not to award more credits for a course than awarded by the originating institution. Below, Coquitlam College has assigned four credits to its biology course, and SFU awards four credits, which is the standard credit for its BISC 100. However, because College of the Rockies only assigns three credits to its course, SFU assumes that the course should be awarded three credits.

Course	Receiving Institution	Transfer Credit	Effective Dates (mm/dd/yy)
COQU BIOL 104 (4)	SFU	SFU BISC 100 (4)	9/1/95 to -
COTR BIOL 151 (3)	SFU	SFU BISC 100 (3)	9/1/95 to -

However, note that Kwantlen has decided to award the same credit as it attaches to the course, regardless of the source credit.

Sending Institution Course	Receiving Institution	Transfer Credit	Effective Dates (mm/dd/yy)
CAMO BIOL 230 (4)	KWAN	KWAN BIOL 2321 (5)	9/1/00 to -
CNC BIO 201 (3)	KWAN	KWAN BIOL 2321 (5)	9/1/00 to -
COTR BIOL 201 (3)	KWAN	KWAN BIOL 2321 (5)	9/1/00 to -

Follow institutional rules for awarding credits for courses where content is equivalent, but credit values differ.

Assigning "Year Level" Credit

Guideline number eight of the *Principles and Guidelines for Transfer* states:

Transfer arrangements between colleges and universities are assumed to be based on "lower division" (i.e., first and second year) studies. It is recognized that the assignment of 'year level' to any individual course might vary at different institutions and, therefore, specific exceptions to this rule might occur under inter-institutional arrangements.

The current policy followed by BCCAT is to record in the *BC Transfer Guide* any articulation agreement involving lower level credit, such as:

- lower level to lower level;
- lower level to upper level; and,
- upper level to lower level credit.

Institutions can use the web-based transfer form to request upper level to upper level articulations. However, practices vary among institutions. See *Upper Level to Upper Level* below.

Lower Level to Upper Level Credit

Each receiving institution establishes its own policy regarding the awarding of upper level credit. For example, one university's regulations require that a lower level course from a sending institution deemed equivalent to its upper level course be awarded 200 level unassigned credit, accompanied by a preclusion of credit, or an exemption, for the upper level course. Examples:

Course	Receiving Institution	Transfer Credit	Effective Dates (mm/dd/yy)
NVIT BUSM 294 (3)	UBC	UBC COMM (3) 2nd. Exempt UBC COMM 393.	1/1/01 to -
NWCC ECOM 250 (3)	UBC	UBC COMM (3) 2nd. Precludes credit for UBC COMM 336.	1/1/01 to -

Another university may leave it up to the faculty to award credit as it sees fit. Examples:

YUKO ANTH 225 (6)	UNBC	UNBC ANTH (6) 2XX. Precludes credit for UNBC ANTH 301.	9/1/95 to -

But

UCFV GEOG 253 (3)	UNBC	UNBC GEOG 300 (3)•	1/1/01 to -

If the course is truly equivalent, assigned credit should be granted. If this is against institutional policy, then exemptions and preclusions can be used.

Applying the principle of equivalence would imply that if the course is truly equivalent, every effort should be made to grant assigned credit for the appropriate course. If this is against institutional policy, then exemptions and preclusions can be used.

Upper Level to Upper Level

Degree granting institutions routinely process requests for upper level credit, and this has become more common with the expansion of degree programs. Many such requests are student driven and are handled on a case-by-case basis, often through a letter of permission.

Where a request is received for an articulation of an upper level course, faculty should follow the normal process of assigning appropriate equivalence. However, the agreement is normally recorded only in the internal database of that institution, and is often subject to review after a set period of time, such as five years.

Specifying a Minimum Grade

All institutions in BC have endorsed a common policy on a minimum grade for course transfer.

Minimum Grade for Course Transfer

The minimum letter grade required of a student to obtain transfer credit for any specific course for which transfer has been established is a 'Pass' (normally a 'P' or 'D' letter grade) as defined by the sending institution.

It is important to note that:

a) a grade of 'C' or higher is normally required for courses intended to be used to satisfy prerequisites;

b) some programs may require a course grade of 'C' or higher for every course to be counted towards a specific credential; and

c) once registered in a degree program a student requires a Letter of Permission to take courses elsewhere and normally requires a minimum grade of 'C' in each course taken at another institution for transfer to the degree program.

Requiring a higher grade from transfer students than an institution requires of its own students is inconsistent with the principle of fairness.

Requiring a higher grade from transfer students than an institution requires of its own students is inconsistent with the *Principles and Guidelines for Transfer* and the principle of fairness and is *not recommended*. However, it is recognized that there may be rare cases where it is appropriate, and where it will allow students to receive credit where they may otherwise not. Example:

Course	Receiving Institution	Transfer Credit	Effective Dates (mm/dd/yy)
CNC COM 204 (3)	UVIC	UVIC COM 202 (1.5). Must have a C or better to receive Commerce credit towards a B.Com degree.	9/1/97 to -
CAP PHIL 208 (3)	UNBC	UNBC PHIL 2XX (3); Exemption from UNBC ENVS 414 with grade of B+ or better.	9/1/01 to -

A general belief in the superiority of one's own standards, or a suspicion of others' standards, does not justify requiring a higher grade.

Such cases must be rigorously assessed and justified. If, for example, a department has researched the performance of students after transfer and can demonstrate a persistent pattern related to grades in a certain course, it may be justified in requiring a grade that is higher than the minimum. Since this can be a potentially difficult situation for the sending institution, it is highly recommended that before making such a decision, the department contact the sending institution and discuss concerns and possible mitigation strategies.

Pedagogy

Normally, *how* a course is taught is assumed to be immaterial to the assessment of equivalence, but there are exceptions.

Normally, *how* a course is taught is assumed to be immaterial to the assessment of equivalence, but there are some cases where the manner in which a course is structured and taught is integral to content mastery. For example, at SFU, in order to assign a 'W' ("writing intensive") designation to a course, a committee assesses the nature and number of opportunities for students to write and revise. In some First Nations courses culturally sensitive pedagogy may be inextricably linked to course content. In such cases, best practice is for the receiving institution to communicate its expectations clearly.

Using Notes for Clarity

Additional notes should be used wherever ambiguity or confusion may occur. Here are some examples:

Course	Receiving Institution	Transfer Credit	Effective Dates (mm/dd/yy)
LANG HIST 2243 (3)	UVIC	UVIC HIST 265 (1.5). HIST 265 may be taken more than once, to max. credit of 9 units.	9/1/00 to -
NVIT ENGL 208 (3)	SFU	SFU ENGL (3). If student already has credit for Creative Writing course, credit will be GE (3) Creative Writing.	9/1/99 to -
SELK BIOL 214 (3)	UNBC	UNBC BIOL (3) 2XX; Biology & NRM Wildlife Fisheries majors will have one of UNBC BIOL 307 or UNBC BIOL 308 waived.	9/1/95 to -
OUC MATH 112 (3)	SFU	SFU MATH 151 (3). May not receive credit for both SFU MATH 151 & SFU MATH 157.	9/1/95 to 8/31/99
OUC MATH 112 (3)	UBC	UBC MATH 100 (3); OUC MATH 112 & OUC MATH 120 = UBC MATH 111 (6). Faculties that require MATH 12 for admission to 1st year grant 3 credits only towards a degree for UBC MATH 111.	9/1/95 to -

Articulating a Course as a Result of a Student Request

While this handbook deals with formal articulation that results from a well-established institution-to-institution process, articulation may also result from student requests for transfer credit for non-articulated courses. An evaluator assessing courses from such student-request processes can use all the principles and tools for articulation outlined in this guide to assess the equivalence of the courses and award appropriate credit.

Most institutions maintain internal databases of courses granted transfer credit in this way, and may use these decisions as precedents for future instances where credit is requested for a course already in the database. While institutions may rely on these precedents, they usually do not consider them as records of formal articulation agreements.

Articulation may also result from student requests for transfer credit for non-articulated courses.

If the receiving institution agrees to grant the transfer credit a student has requested and wishes to formalize this decision as an articulation agreement, it can use the Transfer Credit Evaluation System to notify the sending institution and BCCAT. The agreement will subsequently appear in the *BC Transfer Guide* as a formal articulation. This is good practice, and receiving institutions are encouraged to follow this process wherever feasible.

When a Receiving Institution Changes its Curriculum

Remember that good communication is two way. If in doubt, ask for information!

One of the primary purposes of articulation committees is to provide a forum for the discussion of curricular issues, especially as they relate to articulation. Although receiving institutions should discuss at articulation meetings upcoming changes that may affect transfer, they also have a duty to ensure that all sending institutions are well informed about proposed changes even if they do not have a representative at the articulation meeting.

There are three key elements to this consultation process:

1. All details of the proposed curricular changes should be explicit. Information such as calendar descriptions and course outlines for courses; significant changes in assessment/evaluation practices; proposed changes in prerequisites, degree or credential requirements; or changes to course levels (e.g. from lower division to upper division) should be provided. Feedback from affected sending institutions should be sought. Within the sending institutions it is important that the articulation contact person inform other faculty and relevant administrators of the proposed changes.
2. Adequate timelines should be established for the implementation of curricular changes which will allow for sending institutions to respond. This response may include adapting their own curriculum to fit the proposed changes and this can be a time-consuming process requiring "grandparenting" provisions.
3. The implications for transfer should be thoroughly examined, including the implications outside the immediate department. For example, if a credit value changes from assigned to unassigned for a certain math course, will that course still be acceptable as fulfilling the math requirements in another program?

Thou shalt not articulate thine ego. – Articulation Committee Chair

Multilateral Articulation

While the previous sections of this handbook (*Requesting Articulation: Best Practice* and *Assessing an Articulation Request: Best Practice*) dealt with the most common form of articulation in BC, bilateral course-to-course articulation, several important disciplines organise their articulation activities quite differently. Where a program has similar outcomes, or similar courses offered across institutions, it is often possible to establish multilateral articulation agreements and construct a multilateral transfer guide.

Unlike the course-to course section of the *BC Transfer Guide*, which presents transfer information by institution, a multilateral transfer guide organises information by subject area. Institutional representatives on articulation committees assess courses collaboratively, comparing each course to a set of outcomes or content statements that have been jointly developed as representing an acceptable standard for the course. The committee accepts responsibility for annually maintaining and updating the resultant transfer guides.

A multilateral transfer guide organises information by subject first, rather than by institution.

A multilateral articulation model is more appropriate to some contexts than to others. For some programs using a multilateral approach offers several distinct advantages over a bilateral course-to-course articulation model. First, multilateral articulation does not require some institutions to function as

sending, while others function as receiving institutions. In effect, all are simultaneously sending and receiving, and many faculty find this a more democratic and collaborative approach. Second, such an articulation model results in a transfer guide that can provide information for students as they move between like institutions: between universities, for example, or from one college to another college. Third, although assessing many courses at once in order to construct the initial transfer grid can be a significant task, it is an efficient way to build and maintain transfer tables.

Adult Basic Education

The Adult Basic Education (ABE) Programs have established a set of common curricular elements for most of the major courses offered within the ABE curriculum. Each institution is expected to address the outcomes and the core topics listed for each course. Expectations are clarified and changes are agreed to at the annual meeting of each ABE working group, and the results are recorded in the *Adult Basic Education Articulation Handbook*, published each year by the Ministry of Advanced Education. To quote that handbook: "The process brings order to the Adult Basic Education program area as offered by the post-secondary system and permits the orderly transfer of course work and credits between participating institutions."[6] The latest edition of the ABE handbook is located at aved.gov.bc.ca/abe/handbook.pdf.

Articulation within ABE reaches beyond post-secondary institutions, since ABE programs share a common adult graduation credential, the BC Adult Graduation Diploma (BCAGD). Since students regularly can take courses from both sectors and apply the credits earned towards the BCAGD, it is particularly important that the ABE course offered in colleges conform to the outcomes and core topics outlined in the ABE handbook.

Adult English as a Second Language (ESL)

Similar to ABE programs, ESL programs for adults offered at BC post-secondary institutions are provincially articulated. The information is published by the Ministry of Advanced Education in *Articulation Guide for English as a Second Language Programs in the British Columbia Public Post-Secondary System*. This publication is available at aved.gov.bc.ca/esl/handbook/handbook04.pdf.

In the case of ESL, a significant factor has been the establishing of the Canadian Language Benchmarks. Aligning provincial ESL curriculum to these national standards holds the promise that adult ESL students should

be able to move more easily from institution to institution and from province to province, and have their ESL credits recognised.

The ESL Articulation Committee maintains a transfer grid based on a series of outcomes for each level. Each year the grid is revisited and new courses assessed for placement.

Business Management Transfer Guide

One of the largest multilateral transfer guides in the *BC Transfer Guide* is the *Business Management Transfer Guide*, which is maintained and updated annually by the Business Articulation Committee.

To construct this guide, a group of faculty assessed all courses for equivalence and arranged similar courses in the same band on a transfer table. Institutions collaborated to verify the information and agreed to the use of the information as a transfer guide. A subcommittee of the Business Articulation Committee maintains and updates the guide each year.

Other Multilateral Articulation Agreements

Several other program areas have recently embraced this approach to constructing a transfer guide. There is multilateral transfer information in the *BC Transfer Guide* for Biology, Applied Business Technology, Early Childhood Education, Forestry and Earth Sciences/Geology.

Any articulation committee or discipline based group interested in using a multilateral approach to transfer in a particular discipline or program is encouraged to contact the BCCAT office.

Block Transfer Agreements

What is Block Transfer?

Block transfer is the process whereby a block of credits[7] is granted to students who have successfully completed a certificate, diploma or cluster of courses that is recognized as having an academic wholeness or integrity, and that can be related meaningfully to a degree program or other credential.

Block transfer has been used for many years in the BC post-secondary system to facilitate the credit transfer of completed credentials, such as certificates and diplomas. Although most block transfer agreements deal with the transfer of professional and applied programs, there are also block transfer agreements in place for associate degrees. There are currently several hundred block transfer agreements documented in the *BC Transfer Guide*.

Block transfer agreements represent the most efficient mechanism for arranging transfer credit for graduates of many diploma programs. These programs may be delivered at a standard consistent with degree studies, but the individual courses within the program may lack equivalents at the receiving institution, and may not be readily transferable on a course-to-course basis.

Test Your Assumptions

	TRUE	FALSE
1. Block transfer agreements guarantee admission to a program.	❑	❑
2. The receiving institution is obligated to award the same number of credits as the sending institution (e.g. 60 for 60, 30 for 30.)	❑	❑
3. A block transfer agreement is a way for students to avoid fulfilling degree requirements.	❑	❑
4. Students who transfer in via a block transfer agreement don't do as well as students who completed the whole program in the institution.	❑	❑

Answers

1. FALSE. A block transfer agreement only guarantees admission if such a provision is specified in the agreement. This is rare.
2. FALSE. See the variety of models that follow.
3. FALSE. A block transfer agreement is *not* a shortcut, because students must still fulfill all the requirements of the degree.
4. FALSE. The only study conducted so far to compare block transfer students with students entering directly from high school showed no significant difference in performance. See bccat.bc.ca/articulation/projects/cycblock.pdf.

For example, graduates of a two year college forestry diploma program, designed as a terminal, employment-oriented credential, may receive little or no credit towards a forestry degree on a course-to-course basis. However, under bilateral block transfer agreements, students from some diploma programs who have successfully completed the credential are eligible for either one or two years of credit towards a forestry degree at some institutions. The content of first and second year courses at the sending and receiving institutions is sufficiently different that it precludes the establishment of equivalencies and hence the granting of credit for individual courses. Nevertheless, an assessment of the entire diploma curriculum will establish whether graduates are likely to possess the prerequisite knowledge, skills and abilities necessary for success in upper division degree courses.

There are no rules for negotiating block transfer agreements and no right or wrong approaches.

In the example above, and in typical block transfer agreements, the transfer agreement refers to a specific program at the receiving institution. For example, a social work diploma program may receive block transfer towards a social work degree. The credits earned in this way may not be applicable to a different degree, unless they are transferable on a course-to-course basis.

Each block transfer agreement involves a unique program at the sending and the receiving institution. The educational content of those programs and the institutional context dictates the nature of each block transfer agreement. Depending on the desired outcomes, negotiating parties may want to explore several models.

The term "year" is used here to denote a credit year (e.g., 30 credits, 15 units) rather than a calendar year.

Models of Block Transfer

The following list attempts to describe some of the models of block transfer currently in use in BC. Note that in the *BC Transfer Guide* the term "individual assessment" is often used in the "conditions" column. This denotes that there are underlying terms and conditions to the agreement that are normally recorded in the agreement document, but for which there is not enough space in the *BC Transfer Guide*. (See *Individual Assessment* in the *Assessing an Articulation Request: Best Practice* section.)

The 2 + 2 Model

The receiving institution grants two full years towards a four year degree program, with no additional requirements. Students should be able to graduate in a total of four years. Two variants occur:

a) The receiving institution accepts a two year diploma for entry, provided that the diploma contains specified courses, or that specified standards or additional prerequisites (e.g. grade 12 Math) have been met; or,

b) The receiving institution accepts a two year diploma for entry into a two year degree completion program. Royal Roads University uses this model exclusively for some degrees. In those instances, the diploma is considered among criteria for admission, since RRU does not offer first and second year courses.

PROGRAM	Receiving Institution	Program	Credit	Conditions
College of New Caledonia Dental Hygiene	University of British Columbia	B.D.Sc.	2 years	Graduate dental hygiene program. Individual assessment req'd.
Douglas College Hotel & Restaurant Management Dip	Capilano College	B.Tourism Management	Up to 60 credits	Minimum GPA 3.0

The Bridging Model

There are many variations on these block transfer models.

The receiving institution grants two full years towards the degree. However, because it judges students' background to be deficient in some areas, it specifies courses that must be taken before proceeding or as soon as possible. There are two variants:

a) The courses are taken in the first semester of third year. Students should be able to graduate in a total of four years; or,

b) The courses are taken in a summer semester or over an additional semester. Students should be able to graduate in a total of four and a half years.

The 2 + 3 (or more) Model

The receiving institution grants one year of credit for completion of a two-year diploma. Students can finish the degree in an additional three years after the diploma, or a total of five years. In some cases, receiving institutions grant only a few credits for the completed diploma and in these cases it make take students up to six years to finish a degree.

PROGRAM:	Receiving Institution:	Program:	Credit:	Conditions:
College of New Caledonia Forest Resources Technology Diploma	University of British Columbia	Forest Resources Management or Forest Operations Program only	1 year exemption	Must have been awarded diploma and must have 65% overall average.

Other Models

The upside-down model: Students take some lower division general education courses in third and fourth year.

The 60 credit guarantee model: The receiving institution guarantees students two years credit for a completed diploma, but also establishes equivalencies for as many courses as possible. Courses that have no equivalents are granted elective credit "within the block." This is the model used for the BC Associate Degree.

Bilateral, multilateral models: Although most block transfer agreements consist of bilateral agreements between one sending and one receiving institution, some are governed through consortia, where a group of receiving institutions will collaborate to agree on transfer criteria. In another model (the "admissions model") a receiving institution accepts certain diplomas from any sending institution.

Eclectic models: Institutions or programs focused on student-centred and flexible admission policies may try to be as open as possible to maximizing transfer credit, and may grant blocks of credit for previous degrees, diplomas or certificates, workplace or prior learning, or non-traditional accreditation. Students can often receive three years (or even more) of credit, and finish their degree by completing the minimum residency requirements of the institution.

Assessing the "Block" to be Transferred

In preparing for a block transfer agreement, the sending institution submits all relevant documentation to the receiving institution for evaluation. The receiving institution assesses all the material it has received, and makes a determination as to the appropriate transfer arrangements.

> The purpose of assessing the complete curriculum, in a block transfer agreement, is to establish whether graduates possess the knowledge, skills and abilities to be successful in further studies.

Some assessment variations:

- Transfer is based on informed assumptions about the content of the diploma, and no real assessment of programs at individual institutions is attempted. For example, some institutions accept applications from graduates of any Business Management diploma program from a BC institution and award block transfer of two years towards a business degree completion program.

Assessment methods vary depending on the model in use.

- Transfer is based on an in-depth assessment of individual courses within the diploma. The receiving institution is satisfied that the courses are substantially comparable to its own lower division requirements or offerings.
- Transfer is based on an in-depth assessment of the entire diploma. The receiving institution is satisfied that while individual courses do not match its own courses exactly, similar curriculum content is covered in the program.
- Transfer is based on a holistic assessment of the diploma or its outcomes. The receiving institution is satisfied that, while the content of the diploma may be quite different from its own lower level curriculum, graduates are likely to have the knowledge and abilities to be successful at the third year level.

In each of the above cases, where deficiencies are identified, receiving institutions may stipulate how and when students must acquire the missing content.

The Role of Advising

With good planning and advising, a block transfer agreement can be a tremendous asset to the transfer student.

Some advisors express concern about block transfer agreements, citing the unrealistic expectations such an agreement may create for students. For example, students who receive block transfer credit for a completed associate degree may assume that they can finish a degree in a further two years or 60 credits of study. However, given that general degree requirements must be fulfilled, as well as all requirements for major or minors, students may still have more than two years of study ahead.

It is vital that the exact terms of all block transfer agreements are clear and transparent for students and advisors so that they understand *before transfer* exactly what the agreements entail for them. Parties to any block transfer agreement should take time to go over its provisions carefully with anyone who will be in a position to advise students. It is also crucial to ensure that any promotional material clearly states all provisions and requirements. In some unfortunate cases, block transfer agreements have earned the reputation of being "good news/bad news" agreements. The good news is that students understand that they will receive two years of credit for their diploma. The bad news is that they find out upon transfer that few of those credits can be applied towards their degree, with the effect that it may take them extra time to complete their degree.

With careful planning, and the assistance of an experienced advisor, however, a block transfer agreement can be a tremendous asset to the transfer student.

Concluding a Block Transfer Agreement

Block transfer agreements are negotiated between institutions, with exact details being worked out between departments.

Once concluded, the details are recorded on the *Block Transfer Agreement Form* (Appendix E), and returned to BCCAT by the registrar's office of the receiving institution.

> Parties to a block transfer agreement will find it helpful to consult the "Checklist for Negotiating a Non-Standard Articulation Agreement" in Appendix D of this handbook.

Transfer Innovations

While bilateral course-to-course articulation is the foundation of transfer in BC, other models can supplement traditional articulation or can substitute for it. This handbook has already described two different approaches to articulation: multilateral articulation and block transfer agreements.

As many articulation committees have already found, there are excellent reasons for exploring innovative approaches. While course-to-course transfer agreements facilitate the transfer of individual courses, in some disciplines the real challenge for students lies in fulfilling the requirements of disparate pre-majors. A flexible pre-major model (see below) can provide the flexibility that students and sending institutions need to plan a transfer program. Where the first two years vary widely across institutions, a core curriculum exercise may also be a sensible approach. Where the first two years have commonalities across institutions, it may also work well to construct a multilateral transfer guide.

"The problem is not that courses don't transfer. The problem is trying to fill different institutions' program requirements before transfer."

– College Advisor

Articulation committees or other groups who would like to explore an alternate model of transfer for their discipline are encouraged to contact the BCCAT office (articulation@bccat.bc.ca) to see if project funding is available. More information on projects is available at bccat.bc.ca/articulation/projectapp.html.

Fulfilling the requirements of the pre-major has become the single most problematic area of transfer for academic students.

Flexible Pre-Major

The "pre-major" is defined as the set of first and second year courses which students are required to complete in order to be admitted to a major program, usually at the end of the second year of a four-year degree. The difficulties that students face in fulfilling pre-major requirements can be ascribed to two main factors. First, all institutions review their programs and update them over time, and all offer specializations based upon departmental focus and expertise. Accordingly, requirements once quite similar across institutions may eventually diverge. Second, university colleges, institutes, and universities are developing new degree programs including unique approaches to majors. The result is that sending institutions are experiencing increasing difficulties in devising a set of courses that will enable students to transfer to more than one receiving institution.

A flexible pre-major involves devising a list of requirements, deliverable at all participating sending institutions and acceptable by all participating receiving institutions. The requirements can be expressed in terms of articulated courses, which can vary from institution to institution, and/or in terms of outcomes. By fulfilling these requirements the student is deemed to have completed the pre-major and is therefore eligible to apply for admission to the major.

Core Curriculum and Other Curriculum-Based Articulation

Some articulation committees have recognised that articulation of individual courses can be challenging when the curriculum is constructed differently across institutions. Committees have taken various approaches to this issue. For example, the Math Articulation Committee has agreed on a core curriculum for first-year calculus (bccat.bc.ca/articulation_projects/calculus.pdf). The English articulation committee has developed a document that outlines common "aims" for first-year English literature and writing courses (bccat.bc.ca/articulation_projects/aims2002.pdf). Institutions have found it helpful to refer to these documents when making transfer decisions.

Flexible Program Transfer

BCCAT is always interested in assisting institutions, articulation committees, and/or other groups to explore new ways of articulating that the make most sense for their programs, and that enhance transfer opportunities for students. Program areas have taken a variety of approaches to arrange for flexible transfer between institutions. A browse through the "Program Transfer" area of the *BC Transfer Guide* will illustrate the range of projects and their results.

Frequently Asked Questions

1. Once an articulation agreement is in place, can it be cancelled?

There are several legitimate reasons to consider cancelling an articulation agreement. For example, an institution may revise its curriculum, or changes in a course over time may alter its equivalence. In such situations, an end date is assigned to the old agreement in the *BC Transfer Guide* and a new agreement is recorded.

Although rare, a third reason arises when concerns are raised about academic standards at the sending institution, because of a pattern of under-prepared students. Cancelling an articulation agreement for this reason is a very serious matter, and one which should only be undertaken after weighing the evidence, the justification, and the consequences. Therefore, a useful next step is to undertake an analysis of how students from the sending institution have performed in courses they have taken after transferring.

If, once the evidence is reviewed, the receiving institution continues to feel there is cause for concern, best practice is to address the matter directly with the sending institution. All sending institutions understand the need to be in good standing in the transfer system, and often respond well to advice, assistance and direction. If sensitively handled, a "heads up" or offer of assistance will be appreciated. A good place to start may be a friendly

Before cancelling an articulation agreement, the evidence and consequences should be carefully weighed.

contact between articulation committee representatives.

Articulation committees can play an important role in preventing and resolving disputes.

In the light of the serious consequences that result for a sending institution and its students when a receiving institution makes a decision to cancel or alter transfer credit, BCCAT always recommends a preventative approach whenever possible. BCCAT, if requested to do so, can also play a mediation role, should the receiving institution's own efforts not be welcomed.

2. **How are articulation disputes resolved?**

   Despite the size and complexity of the BC Transfer System, articulation disputes are not common. The most frequent occasion for an inter-institutional articulation dispute arises when a receiving institution changes its curriculum. The change may create difficulties for sending institutions as they try to balance the requirements of a several receiving institutions, or the timelines for adaptation of the new curriculum may be inadequate.

   Articulation committees can play an important role in preventing disputes, by ensuring that any items affecting articulation relationships are given adequate time on meeting agendas. They can also assist in resolving disputes when they arise, through discussions at the meeting, or through the work of a sub-committee.

   If the parties to an articulation dispute have made a sincere effort to resolve the dispute but have been unable to reach agreement, BCCAT will act in a mediation role, if invited to do so. The Council has no jurisdiction to arbitrate, and cannot interfere with the internal policies and practices of autonomous institutions. However, BCCAT has successfully mediated disputes as a neutral third party, bringing relevant personnel from the affected institutions together to attempt to reach an outcome satisfactory to all sides. Contentious issues have included instructor qualifications, perceived low standards at sending institutions, transcripting practices, and admissions or transfer policies and processes that advantage or disadvantage students.

3. **How can an institution articulate with an institution that is not a member of the BC Transfer System?**

   As autonomous entities, BC post-secondary institutions are free to articulate as they see fit. However, only those institutions and programs that have been approved to belong to the BC Transfer System will be listed in the *BC Transfer Guide*. Please consult the BCCAT website (bccat.bc.ca/system/pubprivate.htm) for the most current information on how a private post-secondary institution can apply to become a member of the BC Transfer System.

Each institution in the BC Transfer System has developed its own policy on accepting transfer credit from out-of-province institutions, public and private. The registrar's office is the best resource for information on institutional policies and practices.

4. Can credit be granted for courses taken at a secondary school?

Most institutions in BC award credit for Advanced Placement and International Baccalaureate courses. Details of this kind of credit can be found in the *BC Transfer Guide*.

In addition, many secondary schools in BC are interested in working with their local post-secondary institution to formulate dual-credit or transfer credit agreements. BCCAT recommends a resource produced by the Centre for Curriculum, Transfer and Technology in 1997: *Enhancing Transitions: A Guide to Creating Formal Agreements between School Districts and Schools and Colleges, University Colleges, Institutes and Agencies*. A PDF copy can be downloaded from the BCCAT website at bccat.bc.ca/pubs/etransit.pdf.

5. What is the difference between Prior Learning Assessment and Recognition (PLAR) and transfer credit?

While transfer credit based on articulation is one way of recognising a student's prior learning, articulation is a very different process from those used in the PLAR policies in place in our institutions. Prior Learning Assessment refers to the assessment of what a student can demonstrate that he/she knows, or is able to do. The learning may have been acquired in informal or non-formal settings, such as work experience or on-the-job training or personal study, and the assessment is carried out by a qualified assessor.

The awarding of credit based on a PLAR process is an after-the-fact assessment of what a student has learned. In contrast, the awarding of transfer credit is normally a proactive process – that is, the articulation processes establishes the equivalence of courses, and the transfer credit is based on the results of the articulation, and not on what the student knows. Transfer credit based on articulation is normally awarded before a single student takes the course.

6. Can courses taken in a language other than English be articulated?

Occasionally institutions receive requests to articulate a course delivered in a different language. This does not refer to a language course (e.g. German), but a course in which the content (e.g. sociology) is taught in a language other than English. In this situation it is important to go back to the principle that students should not have to repeat content of which they have already demonstrated mastery.

In the case of learning acquired in another language, an individual assessment by program faculty of the course outline or program materials is the only method of assessing what the appropriate transfer credit is. Normally, a course outline should be provided in translation so an accurate assessment can be conducted. The additional consideration is whether the receiving institution feels that it is appropriate to award a credential to a student who may know the material in his/her own language, but not be able to reproduce it, or apply it, in English. If the receiving institution offers the credential in English, an assumption can be made of an implicit guarantee that the student will be able to function within the discipline or profession in English. The institution may be able to address this issue with an additional requirement for English proficiency for all students.

Appendices

Appendix A: Articulation Resources Online

1. Articulation Section, BCCAT Website

The pages located at bccat.bc.ca/articulation/index.html are dedicated as a resource for all articulation committees. Lists of committees, contact information, meeting dates, reports of interest, and the *Principles and Guidelines for Transfer* are located here.

2. Transfer Innovations and Transfer and Articulation Projects

Following the publication of *Innovative Transfer Models: From Theory to Practice* (bccat.bc.ca/articulation/transfermodels.pdf), a number of articulation committees have implemented various Transfer Innovation projects funded by BCCAT. These projects have resulted in substantially improved transfer routes in several disciplines.

Information on how to apply for similar projects can be found at bccat.bc.ca/articulation/projectapp.html.

Final reports on many projects are located at bccat.bc.ca/articulation/finalreports.html.

Related resources include:

The Advisor: New Routes to Transfer bccat.bc.ca/pubs/advisor01-11.pdf

Transfer: What's the Problem? .bccat.bc.ca/pubs/sr_apr99.htm

Transfer: Some Solutions bccat.bc.ca/pubs/sr_apr00.pdf

The Advisor: Beyond Course to Course: New Information in Program Transfer bccat.bc.ca/pubs/advisor03-05.pdf

Special Report: Articulation Committees Move Transfer in New Directions bccat.bc.ca/pubs/sr_newdirections.pdf

3. Articulation Committee Handbook

This 45-page publication is a guide to the mandate and operations of post-secondary articulation committees in BC. It details the role and terms of reference for articulation committees and includes the principles and guidelines that govern articulation agreements. Also discussed are the roles and responsibilities of the Chair, individual committee members, the System Liaison Person, and BCCAT, setting effective agendas and preparing minutes. It can be found at: bccat.bc.ca/articulation/achbook/index.htm

4. British Columbia Transfer Guide (Print Edition)

The print publication, *British Columbia Transfer Guide 2002-2003*, contains information on the formal and informal criteria, policy, processes, regulations, and agreements for transfer formulated by BCCAT and endorsed by all institutions that participate in the BC Transfer System. bccat.bc.ca/pubs/bctg02-03.pdf.

5. BCCAT Transfer-Friendly Course Outline Form

Developed by a committee of experienced faculty and administrators and with large-scale consultation within the BC Transfer System, the course outline form is designed to ensure inclusion of all information needed to assess transfer equivalence. The form is accompanied by a host of related resources, including forms for use when requesting designation at SFU for Writing Intensive ('W'), Breadth ('B') or Quantitative ('Q') courses. The form is hosted at bccat.bc.ca/outline.

6. BC Transfer TIPS

Transfer Information for Post-Secondary Success (TIPS) is a user-friendly, student-oriented guide to transferring between BC postsecondary institutions. It includes tips, student quotes, scenarios, a personal plan, and a checklist.

7. Enhancing Transitions

This useful handbook guides the reader through the process of constructing articulation agreements for secondary to post-secondary transitions in BC. bccat.bc.ca/pubs/etransit.pdf

8. Report of the Working Committee on Public-Private Articulation Agreements

This report outlines provincial policy in 1997 on articulating with private institutions. It includes helpful checklists and guidelines. bccat.bc.ca/pubs/wcppaa.htm

9. Education Planner

Education Planner is an educational planning resource whose purpose is to provide clear, reliable and detailed information about public post-secondary programs available in BC. Using *Education Planner* can help learners make well-informed decisions about their education and career options. educationplanner.bc.ca

10. BCcampus

BCcampus was established in 2002, with a mandate to provide BC learners with a web-based access point to online learning programs and services. Its aim is to bring online learners directly to the programs and courses of BC's higher education institutions. bccampus.ca

Appendix B: Glossary Of Articulation Terms

Advanced Standing

Advanced standing is placement to a certain level, based on assessment of previous work, or on achievement in a placement test. In BC institutions credit is normally not granted for advanced standing, and credit for exempted courses (see *Exemption*) must normally be replaced by taking other courses.

Articulation

The process used by post-secondary institutions to determine which courses are equivalent to one another. Articulation is normally a course-to-course analysis or comparison, but it can also involve whole programs. By extension, articulation refers to the development and implementation of agreements that provide for inter-institutional movement of students or the connecting of two or more educational systems.

Assigned Credit

Transfer credit is "assigned" when a course is assessed as being equivalent to a specific course at a receiving institution. For example, UCFV's Math 111 course is equivalent to UBC's Math 100 course. (See also *Unassigned Credit*.)

Block Transfer

Block transfer is the process whereby a block of credits is granted to students who have successfully completed a certificate, diploma or cluster of courses that is recognized as having an academic wholeness or integrity, and that can be related meaningfully to a degree program or other credential.

Cluster Credit

"Cluster credit" denotes situations where two or more courses must be combined, at either the sending or the receiving institution, in order to achieve equivalence

Course Outline

A description of the main content, organization and expected outcomes of a course, normally including the number of credits awarded for successful completion, hours of class time required, evaluation procedures, assignments, texts and readings.

Credit

The value assigned to a course. For example, many courses are valued at 3 credits. Most credentials specify the number of credits to be earned. (See also *Unit*.)

Exemption

The waiving of a requirement. A student may be excused from completing a course or program requirement if the appropriate institutional representative grants approval; usually exemptions are granted only to students who have proven that they have comparable learning. Although an exemption may be granted, the student is normally required to replace the exempted course with an alternate.

Level Credit

Some institutions assign "level credit" where a course does not have an equivalent at the receiving institution. e.g. CAP CHEM 205 (3) = UVIC CHEM (1.5) 200 lev. (See also *Unassigned Credit*.)

Lower Level (or Lower Division) Courses

Introductory courses, usually making up the first two years of a university degree, are considered lower level or lower division courses.

Preclusion

A preclusion indicates that a student will not receive credit if he/she takes the specified course later, as in "precludes credit for Anthropology 301."

Receiving Institution

The institution to which a student intends to transfer. In an articulation agreement, it is the institution which grants credit for course work completed at a sending institution.

Sending Institution

The institution from which a student is transferring. In a transfer agreement, it is the institution where the courses were completed.

Transfer

Transfer credit indicates the granting of credit toward a credential by one institution for programs or courses completed at another.

Unassigned Credit

Transfer credit is "unassigned" when a course is assessed as being of a university level but not equivalent to a specific course at a receiving institution. Example: MALA CHIN (3) 2nd yr.

Unit

Two institutions in BC use a unit rather than credit system: the University of Victoria and North Island College. Three semester credit hours = 1.5 UVic units. (See also *Credit*.)

Upper Level (or Upper Division) Courses

Advanced courses offered in the final two years of a university degree are considered as upper level or upper division courses.

Appendix C: Principles & Guidelines for Transfer[8]

Preamble

Transfer relationships in British Columbia are governed by statements which were adopted by the Council in 1993 after thorough consultation with the institutions of the BC Transfer System.

The principles and guidelines are based on those formulated by the British Columbia Post-Secondary Coordinating Committee and approved by university senate and college councils in 1976 and 1977.

Principles

1. The primary purpose for transfer among colleges, universities and institutes is to increase student accessibility to post-secondary education by facilitating student mobility between institutions.

2. Each institution in the British Columbia post-secondary system will seek to enhance accessibility by planning for, and accepting as transfers, students who have completed a portion of their post-secondary studies at another institution in the system.

3. In any transfer arrangement, the academic integrity of the individual institutions and programs must be protected and preserved.

4. Awarding of transfer credit will be governed by the policies and regulations of the Senates and Boards of the institutions concerned.

5. Course or program transfer credit should be based on equivalence of academic achievement and of knowledge and skills acquired.

6. In determining the eligibility of transfer students for admission, receiving institutions will give primary consideration to a student's post-secondary academic record, provided the student has completed at least 30 credits of post-secondary studies.

7. While the minimum conditions for admitting transfer students will be published, receiving institutions may limit admissions to programs based on availability of resources.

8. Admission of transfer students to some programs may be based upon criteria pertinent to the program, additional to academic performance. While academic prerequisites ensure eligibility, they do not guarantee admission to a particular program.

9. If transfer arrangements are to be effective, students must be provided with information, prior to beginning their programs at sending institutions, as to course equivalencies, program prerequisites, and levels of achievement on which admission to and awarding of transfer credit at receiving institutions will be based. Receiving institutions should not make changes in these arrangements without providing adequate notice and lead time to sending institutions.

Guidelines

1. Although formal transfer negotiations shall take place via the designated persons at each of the institutions, discussions concerning course content, adequacy of supporting facilities and related matters should generally occur first at the local (i.e., department to department or instructor to instructor) level. The institutions seeking transfer credit should be prepared to provide the following information: course name, course number, length of instructional period, hours per week (lecture, lab, seminar) objective of course, and - although subject to change without notice - texts and required reading, initial proposals for method of instructing and evaluation, and the qualifications of instructors.

2. Negotiations between institutions regarding equivalence should recognize that effective learning can occur under a variety of arrangements and conditions. Various methods of demonstrating or achieving equivalence may be employed, particularly for career programs, for example, course equivalence, competency tests, challenge exams, program equivalence and bridging programs.

3. Program or discipline articulation committees consisting of representatives of institutions offering the respective programs meet routinely to share information and enhance cooperation among people providing instruction in given areas of study; to promote course equivalence where appropriate; and to aid in the process of achieving inter-institutional transfer credit. Curriculum issues arising from transfer agreements may be addressed to appropriate articulation committees.

4. An institution which denies the transfer of credit requested by another institution shall state the reasons for the refusal.

5. Once an agreement has been reached on the conditions of credit transfer of an individual course or program of studies, it shall not be abrogated without reference to the designated authorities in the institution affected.

6. An institution planning changes to its curriculum which will affect the requirements for credit transfer should inform the members of the relevant articulation committees as far in advance of implementation as possible so that other institutions can consider the desirability of alterations to their courses and programs. Until others have been notified of changes, institutions have an obligation to fulfill the commitments of current course outlines.

7. The minimum GPA for admission as a transfer student is normally 2.0 (C). Receiving institutions which require higher GPAs for programs to which access is limited and for which transfer quotas have been established will normally give preference to students who have completed as much of their programs of studies as is feasible at the sending institutions. For one of a kind programs or programs with very limited enrolments (usually professional and career) for which sending institutions offer specific transfer programs, appropriate administrators from sending and receiving institutions should, as part of a transfer agreement, establish enrolment quotas for each of the participating institutions.

8. Transfer arrangements between colleges and universities are assumed to be based on "lower division" (i.e., first and second year) studies. It is recognized that the assignment of 'year level' to any individual course might vary at different institutions

and, therefore, specific exceptions to this rule might occur under inter-institutional arrangements.

9. Transfer of credit includes the following categories:

(i) Specific equivalent of a given course (assigned credit);

(ii) Unassigned (elective) credit in a discipline or department;

(iii) Unassigned (elective) credit in a faculty or program;

(iv) Unassigned (elective) credit for courses not identifiable with course offerings but which are evaluated as being appropriate for academic credit on transfer.

Supplemental Principles and Guidelines for Flexible or Innovative Transfer

Preamble

After extensive study and consultation, the BC Council on Admissions and Transfer (BCCAT) has concluded that transfer among institutions in BC has become and will continue to become more complex due to the increase in the number of degree granting institutions. To maximize student access, the BC post-secondary education system is committed to enabling students to transfer relevant credits among institutions. In order to sustain this commitment in the face of the increasing number of receiving institutions and complex patterns of student movement among institutions, the BC Council on Admissions and Transfer is working to encourage the development of more innovative, flexible and efficient transfer arrangements. In doing so it recognizes the existence of necessary constraints on credit transfer, but wishes to minimize inequities and difficulties faced by students and institutions.

Therefore, the Council has developed a set of *Supplemental Principles and Guidelines for Flexible or Innovative Transfer*. These new principles and guidelines have not been formalized, in the sense of being developed through a process of extensive consultation with the post-secondary system. Nevertheless, Council believes that they are potentially very useful, both generally, and for application to projects to develop alternate, flexible approaches to transfer.

General Principles for Flexible and Innovative Transfer

1. Students should be able to complete all lower division degree requirements at a college, provided that the college offers a reasonable variety of courses in their chosen discipline.

2. Neither transfer nor direct entry students should be advantaged or disadvantaged as a result of the transfer process.

General Guidelines for Flexible and Innovative Transfer

1. Variations in institutional programs that reflect differing missions, context or expertise should be respected and accommodated. Accommodation strategies may include receiving institutions setting more flexible course or credit requirements for transfer students than for direct-entry students.

2. Sending and receiving institutions should provide a written rationale for the designation of courses as upper or lower division when requested.

3. Each receiving institution should normally grant the same number of credits for each transfer course as it grants its own equivalent course.

4. For the purpose of assessing equivalence, comparison of courses or programs may be based on a variety of factors, including the following (as many as are appropriate):

- comparison of detailed content elements
- comparison of outcomes
- comparison of general subject matter
- comparison of depth or breadth of coverage of subject matter, even if content details or approach are different
- comparison of assessment
- documented evidence of student success in subsequent courses

5. Block transfer, flexible transfer or transfer innovation agreements should not undermine the ability of students to continue to transfer on a course by course basis.

6. Students and institutions should be satisfied that transfer decisions are considered in a consistent manner. Post-secondary institutions should develop and maintain clearly stated policies and procedures for consideration of transfer of credit. Students should be able to obtain an institution's rationale for a refusal, and institutions should have clear procedures for students to appeal such decisions.[9]

Guidelines for Block Transfer Agreements

Definition of Block Transfer: *Block Transfer is the process whereby a block of credits is granted to students who have successfully completed a certificate, diploma or cluster of courses that is recognized as having an academic wholeness or integrity, and that can be related meaningfully to a degree program or other credential.*

1. Block Transfer agreements will normally involve certificate or diploma programs from the sending institutions, but may also involve smaller blocks or clusters of courses or credits.

2. Where the receiving institution does not grant the number of credits equivalent to the number the sending institution grants for the block, it should provide clear rationale for the number of credits granted.

3. While many block transfer agreements include a provision that the student is deemed to have fulfilled all lower level requirements, others may stipulate that any lower level requirements that have not been completed must still be taken.

4. Block transfer agreements should be clear, in that each student should know exactly what credit he/she will receive at the receiving institution.

5. A block transfer agreement does not guarantee admission to the receiving program or confer priority status, unless such provisions are specifically built into the agreement.

6. The standards or criteria for program admission for students transferring under a block transfer agreement should be clearly stated in the agreement.

7. Sending and receiving institutions should reach agreement on what constitutes replication of coursework before a block transfer agreement is finalized. Students should not have to repeat content of which they have already demonstrated substantial mastery.

8. If a block transfer agreement provides for two years of credit transfer, transfer students should be able to finish a four-year degree in a further two years or within a reasonable additional amount of time if deemed essential by the receiving institution.

9. Block transfer arrangements should involve signed formal agreements between a sending and receiving institution.

10. Block transfer arrangements should be well documented (including in the *BC Transfer Guide*) and accessible to students.

11. Depending on the agreement, block transfer agreements may include provision for course-by-course allocation of credit, or may obviate the need for such allocation.

Appendix D: Checklist for Negotiating a Non-Standard Articulation Agreement

The following checklist is designed to assist institutions and departments with the negotiation and assessment process involved in negotiating articulation agreements between institutions, other than standard course-to-course agreements, within the BC Transfer System. Institutions wishing to conclude transfer agreements with private institutions outside the BC Transfer System, or with institutions outside BC, or to reach agreement on the block transfer of specific programs, may find this checklist useful.

> It is not intended that partners to an agreement follow every step in the checklist. Rather, the list is provided as a set of helpful suggestions to be used at the discretion of the institutions and programs involved.

Preparing for the Agreement

- ☐ Consult appropriate individuals/groups within your institution.
- ☐ Obtain the necessary internal approval to proceed.
- ☐ Evaluate the cost to the organization, if any, of proceeding.
- ☐ Decide what type of agreement is appropriate (e.g. course-to-course, block transfer, flexible pre-major)
- ☐ Check the *BC Transfer Guide* for existing or similar agreements.
- ☐ Select an individual to lead the articulation process.
- ☐ Decide who will perform the detailed articulation (e.g. examination of course content).
- ☐ Alert any internal committee that should review results.
- ☐ Inform the appropriate people if the agreement will affect multiple campuses.
- ☐ Consult relevant licensing or professional bodies.
- ☐ Consult public institutions with which the course/program has links.
- ☐ Consider internal approval policies and prepare relevant documents (e.g. for Senate, Education Council, etc.).
- ☐ Establish a timetable for finalizing the agreement.

Establishing Course, Program, and Institutional Fit

- ☐ Clarify the purpose of the course(s) or program(s) under consideration for articulation.
- ☐ Ensure the resources used by the course/program are appropriate and sufficiently current.
- ☐ Ensure software used by the course/program is appropriate and sufficiently current.

- ☐ Determine the length of the course/program.
- ☐ Determine what content the course/program covers.
- ☐ Check that there is an appropriate match of course/program content between sending and receiving institution.
- ☐ Ensure the content is covered to the same depth.
- ☐ Determine the teaching or content delivery methods.

Ensure assessment practices are :

- ☐ clearly related to the goals and objectives of the course/program; and
- ☐ proven to be effective in assessing student learning.
- ☐ Request information about the institutional policy regarding qualifications required of instructors.
- ☐ Inquire whether the program can demonstrate a history of success as measured by student learning, student satisfaction, employment outcomes, or subsequent performance of transfer students.

Finalising the Agreement

- ☐ Exchange site visits, if necessary, with the other institution.

Ensure the following is included in the agreement:

- ☐ an official implementation date;
- ☐ a renewal date;
- ☐ terms by which either party may terminate the agreement;
- ☐ terms for regular review; [Note: Substantive changes to curriculum, program/course length, delivery methods, equipment, outcomes, etc. may require a review.]
- ☐ a process to exchange relevant information which may affect the agreement after it is signed and before the next scheduled review.
- ☐ Clarify whether the agreement is reciprocal; that is, that terms are specified whereby students can move between institutions in either direction. [Note: While this may not be feasible in many situations, good practice is to encourage reciprocity whenever possible.]
- ☐ Specify whether the agreement will apply retroactively to accommodate graduates of either institution's articulated program(s), and for what period of time.
- ☐ Plan what action should be taken if the decision is not to complete an articulation agreement. [Note: Parties should be prepared to state reasons.]
- ☐ Decide who will sign the agreement for each institution.
- ☐ Decide what format to use to record the agreement (e.g. Memorandum of Understanding, Block Transfer Agreement Form.]

After the Agreement is Signed

Receiving Institution:

- ☐ Send a copy of the agreement to (a) the Registrar's Office, with a request to submit the relevant information to the *BC Transfer Guide* and (b) the sending institution. [Note: Receiving institutions can use the form included in this handbook to submit this information to BCCAT. See Appendix E.]

Receiving Institution and Sending Institution:

- ☐ Check who in the institution must be made aware of the agreement (e.g. faculty, the registrar's office, advising services, etc.).
- ☐ Decide who will maintain links with the partner institution for purposes of coordinating or making changes to the agreement.

Appendix E: Block Transfer Form

Block Transfer / Other Transfer Agreement or Arrangement

(To be used for all transfer agreements other than course-to-course transfer)

For inclusion in the British Columbia Transfer Guide.
When completed and approved by an appropriate Receiving Institution representative, this form authorizes BCCAT to publish the information submitted in the BC Transfer Guide and its online version.

Complete the form below, and Fax to: 604-683-0576, or mail to Transfer Guide Coordinator, BCCAT, 709 – 555 Seymour St., Vancouver, BC, V6B 3H6. *If insufficient space for all details, attach separate sheet.*

Receiving Institution:

Receiving Institution Program Name:

Will accept block transfer of:
(name or type of diploma, certificate or block of courses; e.g. completed diploma in Business Management)

Will accept block transfer from:
☐ Any other BC public post-secondary institution
☐ Any other Canadian institution
☐ The following institution(s): _____
☐ Other: (specify) _____

Credits awarded:
☐ 60 credits or two years ☐ 30 credits or one year ☐ on a course by course basis
☐ To be determined on admission ☐ Individual assessment
☐ other, please specify_____

Other elements of this transfer arrangement:
Preferential entry? ☐ Yes ☐ No
Guaranteed admission? ☐ Yes ☐ No
Other - specify _____

Conditions and/or limitations:
(Specify any course, or any grade or GPA requirements, as well as any other specific conditions or limitations which apply)

For the Receiving Institution...

_____ _____ _____
Your Name (please print) Your Signature Date

_____ _____
Your Telephone Number Your E-mail address

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This Handbook is for Raymond

Finola Finlay, *Writer* Valerie Yorkston, *Project Coordinator*

Endnotes

1. Merriam-Webster Dictionary.

2. *Articulation Costing, Phase II*, by J. Jarvis, March 2004. Available online at bccat.bc.ca/publications/artcosting.pdf.

3. *Research Results: Transcript Assessment Studies: What Transfers? What Doesn't?*, by Jean Karlinski, BCCAT, October 2000. Available online at bccat.bc.ca/pubs/rr-oct00.pdf.

4. Oxford English Dictionary.

5. *Student Access and Mobility Within the British Columbia Post-Secondary System*, John Dennison, June 2000. Available online at bccat.bc.ca/pubs/dennison.pdf.

6. Page 5, 2004-2005 *Adult Basic Education Articulation Handbook*. Ministry of Advanced Education.

7. Not all programs use credits. A 'block of credits' can be interpreted as a semester, or a year, the awarding of advanced standing, or any other form of learning recognition.

8. This document contains 1) the *British Columbia Principles and Guidelines for Transfer* and 2) the *BCCAT Supplemental Principles and Guidelines for Flexible and Innovative Transfer*. Last revision, June 2003.

9. Revision June 2003, to comply with the *Ministerial Statement on Credit Transfer* in Canada, Winnipeg, Manitoba, October 9, 2002.